

# SFS PROVIDES A DATA-DRIVEN PLATFORM FOR INTERVAL FUND FIRMS TO IMPROVE ADVISOR ENGAGEMENT AND HELP GROW SUBSCRIPTIONS

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EINPresswire.com/ -- [SFS](#), a fintech leader in sales reporting and data analytics for the asset management industry, enhances data analytics and reporting for [Interval Funds](#) through its [MARS](#) Platform.



Interval funds offer a controlled structure for liquidity, but with this comes the pressure to better understand investor behavior well in advance of each redemption window. This challenge requires Interval Fund managers to have accurate and timely objective data to forecast investor redemptions and potential incoming subscriptions. Without the proper data analytics and reporting it's difficult for Interval Fund managers to obtain a clear view of trends, liquidity risks, and potential growth opportunities.

Nicole Callies, Director Sales and Account Management at SFS said, "If a wave of redemptions arrives unexpectedly, fund managers can struggle to manage liquidity and potentially disrupt fund performance. Likewise, failing to capitalize on subscription opportunities means missed growth." Callies continued, "Timely and accurate predictions are a key focus for any Interval Fund and SFS' MARS Platform provides visibility into which regions, firms, clearing firms, and advisors are likely to drive redemptions and where subscriptions may be ramping up. The MARS' Platform's data-driven analytics and reporting plays an invaluable role for Interval Fund managers."

By leveraging historical and real-time data through the MARS Platform, firms can start to paint a clear picture of how investors interact with their funds and MARS provides:

- Visibility into which regions, firms, clearing firms, and advisors are likely to drive redemptions, and where Interval fund subscriptions may be ramping up

- Historical and real-time data so firms can spot trends and obtain a picture of how investors interact with their funds
- Objective data-driven
  - Firm-level insights - including which firms are contributing more heavily to purchases, which firm may present redemption risks, and which firms stand out as additional subscription opportunities or risk based on trends
  - Spot outliers so fund managers can allocate resources effectively and ensure investor behavior aligns with fund liquidity management goals
  - Insights into Advisor engagement - identifies which advisors are most active; by aligning with their clients' behavior Firms can build proactive and stronger relationships

Callies continued, "For firms managing Interval Funds the MARS data-driven platform can make the difference between reacting to redemptions after the fact and proactively forecasting investor behavior. MARS provides predictive analytics, detailed reporting, and insights into the data points that help firms manage interval funds with confidence."

The MARS Platform provides a comprehensive system for leveraging Interval Fund data to obtain deeper insights into the behavior of firms, clearing firms, and advisors;

#### About SFS MARS

SFS MARS is a fintech leader in sales reporting and data management for asset management firms. With a suite of advanced tools, including the Optimal Data service, SFS enables firms to optimize their sales and marketing strategies, ensure data accuracy, and gain deep insights into their market performance. Trusted by asset managers across the industry, SFS continues to innovate and provide cutting-edge solutions for the evolving financial landscape

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